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ABSTRACT

Providing a history of the development and evaluation, this report discusses an information product designed to provide useful information to those responsible for staff development. The SourceBook purpose is to increase awareness of the kinds of products that are available for training in instructional planning and management, and to provide sufficient information to permit product screening. An overview including review guidelines, descriptions of 15 program packages, and an annotated list of 27 supplementary training resources compose the three sections of the book. The product evaluation is based on expert opinion and is included in this report. (Author/DW)

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**Development and Evaluation of the
Sourcebook of Training Products in
Instructional Planning and Management
in the
Far West Series in Instructional Planning**

January 1975

Educational Management Program

**Far West Laboratory for Educational Research and Development
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FOREWORD

This report is intended to provide a history of the development and evaluation of one of the products produced by the Educational Management Program. Reference is made in the report to more detailed reports and memoranda which document the development and prototype evaluation procedures used. All of these are available in program files. With one exception, they were submitted to the funding agency as Progress Reports, and so are not reproduced as a part of this report.

The report has been prepared for those who need to make judgments about the quality of the product, but don't have time to become familiar in detail with the separate reports on the development, or to examine the product itself. This SourceBook is essentially an information product. The nature of information products is such that judgments about their value must be based primarily on evidence about the care taken in their preparation, and the opinions of qualified experts. More definitive evaluation can be obtained, but the cost can be quite high. In any case, funds for obtaining such information were not available in this instance.

If readers are willing to base their judgments on the record of development and on the authority and professional independence of those whose opinions are reported, then this report will be useful in arriving at judgments about the product. Otherwise, it can be considered only as part of the documentation of development.

Richard W. Watkins
Program Director
Educational Management Program

The Development and Evaluation of the SourceBook of Training Products in Instructional Planning and Management

The SourceBook is one of the products developed to increase the skill, knowledge and understanding of school personnel in the area of instructional planning and management. Instructional planning is defined generally as that area of educational administration that is concerned with providing educational opportunities for children. This area may be further defined as involving the establishment of instructional program purposes, the design and implementation of programs and the evaluation of instructional purposes. The SourceBook was prepared to provide useful information to those who are responsible for staff development and are considering ways to increase capabilities in instructional management.

Product Purposes and Description

The purpose of this SourceBook is to increase awareness of the kinds of products that are available for providing training in instructional planning and management, and to provide sufficient information about these products to permit a preliminary screening in the process of planning for training.

The book has three major sections. The first section presents an overview of instructional planning and management, and includes some guidelines for reviewing and selecting materials to train personnel in this area of staff development. The second section contains descriptions of 15 program packages that can be implemented in a school district to meet specific needs for training in instructional planning and management. Many of these packages may also be used in college or university courses. The descriptions are generally three or four pages in length, and provide enough information to allow most users to decide whether or not to preview the program package itself. The third major section

gives an annotated list of 27 supplementary training resources that can be useful in complementing a training program in instructional planning and management.

A product description was included in the SourceBook if the product met all of the following five criteria: (a) the product was intended to provide or support training activities; (b) the training was designated for middle management school personnel at the preschool, elementary or secondary levels; (c) the training must be in the content area of instructional planning and management; (d) the completed product would be available for use by January 1975; and (e) the product had been made available within the last five years. The forty-two products that met these criteria were selected from a pool of 152 products which were reviewed.

Product Development and Testing

Early concept papers and program plans for the Educational Management Program noted that it would be necessary to provide organized information about the availability and usefulness of a variety of management training materials and support tools. Little attention was given to detailed specification of the content and format of this information in these early documents, however, since the usefulness of information is so dependent on the characteristics and purposes of those who might be seeking the information. Understanding of these issues was greatly clarified as a result of the efforts in developing training materials during the period 1970-1972. In the field testing and early marketing of its products, the staff learned that many users of management training materials, including consultants who were advising school staffs about training, were unaware of the existence of useful programs or resources. These people recognized the need for more awareness, but said the time and cost of searching for information was prohibitive.

Late in 1972, initial search for and review of materials that could be useful to those concerned with instructional planning were undertaken, and preliminary plans for ways that information planning about these materials might be organized were initiated. A staff memorandum (1)* proposed in some detail a format for presentation that might be used systematically for a variety of materials. In this memorandum, an organizational scheme for a catalogue was proposed that would capitalize on a matrix for organizing planning and management products that had been produced in two national conferences sponsored earlier by the Educational Management Program. The purpose of the conferences had been to assess plans and accomplishments of a variety of agencies involved in the development of products and programs in this area.

The needs to be met and purposes to be accomplished by a resource information product were considered in detail in a paper prepared in May 1973 (2). The two product objectives established as a result of this analysis were: (a) to create an awareness of alternative products available for improvement of school staff capability in instructional planning and management, and (b) to provide sufficient information so that a preliminary screening of these alternatives might be carried out. Preliminary screening implied that appropriate users could at least eliminate those alternatives that clearly would not meet their needs. Eight types of information resources (e.g., ERIC, SRIS, EPIE, IDEA, various Catalogues) were analyzed in detail. The decision was made that a catalogue similar in form and scope to the Sourcebook of Elementary Programs and Projects that had been developed as part of the ALERT System would best meet all of the identified needs of potential users. Thus, the development of such a catalogue could be based on a tested model. It was estimated that as many as 100-150 products might be available and appropriate for inclusion in

*Numbers in parentheses refer to documents listed in the bibliography.

the proposed catalogue. A prototype product description was prepared, and tentative criteria for the identification of products for inclusion established.

Extensive product search activities were continued through 1973, and a prototype catalogue containing ten entries was prepared by the end of the year. The search indicated that the estimate that 100-150 products might be described was too optimistic; the estimate was reduced to a maximum of forty. There were three major reasons for this reduction: (a) very little useful information could be obtained from authors or developers of many of the products identified through literature searches; (b) the time required to assemble and organize complete information, when available, was much greater than anticipated initially; and (c) the financial and staff resources available for completion of this product were sharply reduced at the end of 1973. The plans for the preparation and production of the catalogue were revised and restated in November 1973 (3), and arrangements made to test the prototype version.

The prototype field test of the ten one-page descriptions indicated that the format was acceptable, but that additional work was needed to make the catalogue more appealing and easier to read. Additionally, however, it identified several weaknesses. The categories from the matrix mentioned above, used for presentation of information, were comprehensive; but the lack of available information in each of the categories for many of the acceptable products reduced greatly the ability to compare products. This problem was compounded by the brevity of the information that could be presented in the one page format. It also became evident that the information product to be developed could not really be a catalogue in the accepted sense of the term, and that a somewhat different orientation to work on the product would be necessary.

Decisions on the format, content specifications and categories to be used in presentation of the product descriptions, and on criteria to be applied in

the selection of products for inclusion in the SourceBook were specified in detail in a May 1974 progress report (4). The criteria established at this time are those described above. At the time the progress report was prepared, 152 products had been identified, and 86 had been classified as ineligible for inclusion as judged on one or more of the five criteria. Twenty-three programs and 29 support tools had been tentatively identified as eligible for inclusion.

A review form of the SourceBook containing 15 program and 25 resource descriptions was produced in August 1974. The book was sent to the individual or organization responsible for the development and/or distribution of each of the 15 programs described, with a request that the description be reviewed for accuracy of the information presented. Four of the developers, who had a total of nine entries in the SourceBook, indicated revisions that they judged to be necessary. Virtually all of these suggested changes were made right in the text of the description, and were incorporated in the final form of the book. The majority of the revisions related to price changes, but a few of them related to content of the descriptions. One program description was deleted entirely because the program would not be available by January 1975; one new program description was prepared for the final version, when it was learned that the program would, in fact, be available for purchase in January. Two training resource descriptions were added for the final version, at the suggestion of one of the program developers. The entire book was also sent for review to three people judged to be particularly knowledgeable about the needs and perspectives of educational management, and two who are specialists in the field of educational information dissemination and utilization. The names and institutional affiliations of these five expert reviewers are:

Robert K. Branson
Florida State University

Donald H. Coombs
University of Idaho

David P. Crandall, Director
Network for Innovative Schools
Merrimac, Massachusetts

William Wolf
University of Massachusetts

Arthur Thayer
Assistant Executive Secretary
Association of California School Administrators

The expert reviewers were provided with a Review Checklist, reproduced as pages 9-10 of this report, at the time the review copy of the book was sent to them. All five reviewers made comments in the book itself, and as requested, prepared a written report. Comments from these reports are excerpted or summarized below. The complete reports are available in the Program files. They are not included in their entirety with this report, since they were not initially prepared for wide scale dissemination.

All of the reviewers expressed the belief that there is a real need for a product like this SourceBook. The quotations below are excerpts from their reports, with the name of the particular reviewer quoted shown in parentheses:

"There is no doubt in my mind that school personnel...have a need for a SourceBook such as this." (Crandall) "Yes, I believe this resource book is addressed to an important need of school staff. However, most people with whom I interact either aren't cognizant of this need or aren't able to pay much attention to it." (Wolf)

"The resource book is addressed to an important need of school staff...although it would seem to me that somewhat more management emphasis could be added in subsequent volumes. The resource book provides an efficient way of getting at a number of different kinds of information and I believe interested school people will find it useful." (Branson)

None of the reviewers thought that the criteria used in the selection of products for description limited the extent to which the book could be useful

in meeting the needs of school staff (question 2 on the Review Checklist), although one reviewer did have reservations about excluding products published more than five years ago. He said he was not convinced that products that would otherwise be appropriate for inclusion would be inappropriate simply because they were more than five years old. Several reviewers suggested additional products that might be included, or sources for products, and one reviewer questioned the inclusion of two products directed to improved staff communication skills under the heading of instructional planning and management. In the cases of suggested additions, the suggested products either had been reviewed and rejected because they did not meet one or more of the criteria, or the available information was insufficient to prepare an entry. One reviewer suggested that we include in the catalogue a listing of all products reviewed but not included. This suggestion could not be followed, because the complete bibliographic entries for the products would have increased greatly the size of the book.

The reviewers generally agreed that the SourceBook would fulfill its function as an information resource tool, compared favorably with other available information resources, and is not redundant with existing information documents (questions 4, 5, and 6 in the Review Checklist). The following quotations have been excerpted from the various reviews, with the specific reviewer's name following each quotation.

"I think with a few minor modifications it is an exemplary tool... It is not redundant to the best of my knowledge." (Crandall) "I even learned of programs of which I was not aware...there are few good sourcebooks available or widely known." (Thayer) "The Source-Book impresses me as a useful product awareness tool. I think a key element is the chart on pages 6-7, because that is the one item in the book that pulls everything together...Some of the information resources/tools I could compare the SourceBook to are in areas where the products are more comparable - where it is easier to define attributes and then be quite methodical in listing their presence or absence. A good feature of the SourceBook is that its scope is narrow enough so that considerable detail can be given about each

product included...I know of no other information resource tool which tries to do what the SourceBook tries to do." (Cocmbs) "I have used EPIE materials, PDK materials and other IWL materials. The SourceBook compares quite favorably with these...I have no knowledge of existing information documents which compete..." (Wolf)

Responses to the remaining questions on the checklist were, as expected, quite detailed, since the questions were posed to provide information to be used in revisions of the review version of the SourceBook. These comments can not be easily summarized; they were considered carefully when specific suggestions for change were offered, and many of them were incorporated in the preparation of the final version of the SourceBook.

Conclusion

The reviewer's comments, and other unsolicited comments from Far West Laboratory staff and from staff members in the National Institute of Education who had seen the book, indicated clearly that the SourceBook should be published, following revision as judged appropriate in light of the suggestions. The book has been reproduced in limited quantity by the Laboratory and is available for sale through the Laboratory at \$3.95 a copy. One copy will be included with every set of Coordinator's materials that are provided with the training products that have been produced for sale by the Laboratory.

Review Checklist

Your evaluation of the SourceBook of Training Products in Instructional Planning and Management will provide important information to help us assess its effectiveness and to make appropriate revisions. Please respond to each item listed below. Feel free also to write comments in the SourceBook itself.

1. Do you believe that this resource book is addressed to an important need of school staff?
2. Do you think the criteria applied in the selection of programs for inclusion in the SourceBook (as described in the orientation pp. 3-4) limit too severely the extent to which the SourceBook can meet this need?
3. Do you know of training programs that you think should have been included that are not? If so, assuming we knew of the program, do you think their omission resulted because a) our criteria were too restrictive or b) we did not apply the criteria properly?
4. Comment on whether the SourceBook adequately fulfills its function as a product/information awareness tool.
5. How does the SourceBook compare with comparable information resources/tools you have used?
6. Is the SourceBook redundant with existing information documents? If yes, please explain and identify existing materials.
7. Comment on the format and organization of the SourceBook in terms of the following:
 - a. cover design
 - b. layout and presentation of content
 - c. sequence of sections and within sections, i.e., Introduction, Orientation, Program Reports, Training Resources, Subject and Product Indexes
 - d. style and clarity of presentation, particularly technicality of language, understandability, interest level, etc.
 - e. specific suggestions for improving organization and/or format.
8. Comment on the Program Reports (pp. 5-68) in terms of the following:
 - a. utility of summary chart (pp. 6-7) and need for addition/deletion of descriptive column categories
 - b. clarity and consistency of program descriptions
 - c. need for addition/deletion of categories in descriptions of programs, i.e., are other types of information needed?
 - d. adequacy of level of detail in program descriptions
 - e. need for addition/deletion of programs (If addition, specify title, developer, address, etc., for obtaining product and information about it. If deletion, specify title of program and explain.)
 - f. currency, timeliness, subject-area relevance of programs described.

9. Comment on content, quality, and value of other sections of the SourceBook:
 - a. Introduction
 - b. Orientation
 - c. Training Resources
 - d. Subject Index
 - e. Product Index
10. How could the SourceBook be improved or made more useful in the following areas:
 - a. as an information tool
 - b. in terms of content area/program coverage
11. Include here any comment or critique on the SourceBook, its content, organization, format, etc., not covered by the above items.

BIBLIOGRAPHY

The following memoranda and reports were prepared by Educational Management Program staff during the course of the conceptualization, planning, and development of the SourceBook of Training Products in Instructional Planning and Management. All but the first, which is a staff memorandum, were submitted as milestone reports to the National Institute of Education. They are arranged here by date.

1. Oakley, Gail "EMRS Catalogue" Staff memorandum, March 1973.
2. "Educational Management Resource System Catalogue--A Staff Paper," May 1973.
3. "End of Year Progress Report on 1973 Scope of Work," pp 93-97, November 1973.
4. "Work Unit 11: Instructional Planning Resource Catalogue Progress Report," May 1974.